### Document Change Control

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<th>VERSION</th>
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1 Introduction

This User Guide was prepared for the ServiceNow implementation of the HUIT Change Management process, deployed October 8, 2013.

Changes to this guide are summarized in the document change control at the front of the document, and will highlight changes to the process and/or tool that may address new capabilities as a result of:

- Tool upgrades, improvements and revisions
- Process enhancements and changes
- Related ITSM process implementation/integration

Questions, concerns and/or feedback about this user guide should be addressed to the IT Service Management team at ITSM@harvard.edu

1.1 How this manual is structured

This manual follows the lifecycle of a change request from creation through completion in the ServiceNow ITSM tool.

The table below highlights the purpose of each chapter.

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<th>Chapter</th>
<th>Purpose</th>
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<tr>
<td>INITIATING CHANGES</td>
<td>Describes how to record Normal (Low, Medium and High Risk), Standard, Emergency and Major Change requests.</td>
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<tr>
<td>ASSESSING CHANGES</td>
<td>Describes the way various changes are assessed for risk based on scope, impact and probability of success using the ServiceNow tool.</td>
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<td>DOCUMENTING CHANGES</td>
<td>How to determine and document Services and Configuration Items (CI’s) potentially affected. Appropriate documentation of Implementation, Communications, Testing, and Back out plans.</td>
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<td>ASSIGNING CHANGES</td>
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<td>SCHEDULING CHANGES</td>
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<td>SUBMIT CHANGES</td>
<td>How to submit the Change Request for approval as necessary.</td>
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<tr>
<td>IMPLEMENTING CHANGES</td>
<td>Describes the steps associated with implementing the Change Request, including Change Tasks.</td>
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<tr>
<td>CHANGE REVIEW</td>
<td>How to complete a Change Record and conduct a Post Implementation Review (PIR) as required.</td>
</tr>
<tr>
<td>QUERYING &amp; REPORTING</td>
<td>Provides guidance on how to query and report on Changes and change activity.</td>
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1.2 Who should use this manual

This manual is intended for all participants in the HUIT Change Management process. Each chapter covers major activities in the process, and most process participants may be involved in these activities at any particular time.

Staff should also be familiar with the detailed Change Management Process Description and its contents, which provides information about roles & responsibilities, policies and other important guidance. For a summary of the Process Description, see the Appendix.
2 Initiating Change Requests

The Change Requester completes the change request form, secures appropriate business approval, and communicates status of the Change back to the business and other stakeholders.

2.1 Creating a New Change Request Ticket

Changes can be recorded in ServiceNow by going to Change > Create New in the application navigator or clicking New from any change record list.

When you open a new Change Request, the Change Request form appears (see Figure 2). ServiceNow shows you which fields are mandatory by placing a small red bar in the field label; these fields must
have data in order to save the record. Yellow bars indicate that ServiceNow has automatically populated these fields.

If you open a new Change in error, you may click the small green arrow in the upper left corner of the incident form to go back to the Change record list without creating a new Change record.

![Change Request Form](image)

**Figure 2** – Change Request form

### 2.1.1 Initiating Normal Change Requests

All Changes with a Change Type of Normal must be assessed for risk. You must enter mandatory data (Short description and Description) and save the record with a Change Type of ‘Normal’ before you can assess the risk of the Change. The ‘Normal’ Change Type is selected by default. (See Figure 3)
Figure 3 – Saving a Normal Change Request

Saving the Change record will refresh the form and add some new buttons at the top of the form; ‘Risk Assessment’, ‘Copy Change’, ‘Cancel’, and ‘Update and Return’.

Figure 4 - Saved Normal Change Header Buttons

Risk Assessment
The Risk Assessment button opens an assessment questionnaire that allows calculation of the Risk for Normal changes. See section 3 – ‘Assessing Change Requests’ for additional detail.

Copy Change
The Copy Change button will make a duplicate of the current Change Record, copying all fields into a new Change record with a different Number.

Cancel
The Cancel button will cancel the change ticket. You will be prompted to confirm before the ticket is permanently cancelled.

Save
The Save button will save all changes without leaving the change form.

Update and Return
The Update and Return button will save all changes and return you to the Change record list.

2.1.2 Recording Standard Change Requests
To create a pre-approved standard change, open a new Change Request and select a Change type of ‘Standard’. You will notice that the Risk field has been replaced by ‘Standard change’. (see Figure 5)
Clicking on the magnifying glass will open a pop-up window listing the standard changes available from the Standard Change Library.

Select the appropriate Standard Change from the list and the Change Request form will automatically be populated based on the Standard Change selected.

**NOTE:** Standard Changes are pre-approved, so risk assessment has already been completed (Low Risk). In addition, the *Start date* and *End date* fields are now mandatory at this time.

### 2.1.2.1 Adding to the Standard Change Library

Open the *Standard Change Library* from the application navigator pane and click on the *New* button.
A blank Standard Change form appears. Complete the mandatory fields and click Save. A Request Approval button will appear.

![Standard Change Form](image)

**Figure 6 - Standard Change (Request Approval)**

Clicking this button will request approval of your Standard Change and it will appear in the Standard Change Library with an approval status of Requested. When the Standard Change entry is approved it may be used to execute Standard Changes.

### 2.1.3 Recording Emergency and Major Changes

Open a new Change Request and select a Change type of 'Emergency or Major' (you will notice that the Risk field disappears). If you enter the Summary and Description fields and Save the record, the Request Approval button will appear at the top of the form.

**NOTE:** Before you can Request Approval for a Normal, Emergency or Major Change, you must enter the following mandatory fields: Category, Assignment group, Start date, End date, Implementation plan, Backout plan, Test plan, and Communication plan.
3  Assessing Change Requests

All Normal change requests are assessed for risk based on scope, impact and probability of success. After the ‘Short description’ and ‘Description’ fields are completed and the Change Request is saved, the ‘Risk Assessment’ button will appear as noted earlier.

3.1  Risk Assessment Button

Clicking the Risk Assessment button will open the Harvard Change Risk Assessment pop-up window (see Figure 7). The Change Requester must complete the Risk Assessment and click ‘Submit’ in order to categorize the Change Request as a LOW, MEDIUM or HIGH Risk change.

![Figure 7 - Harvard Change Risk Assessment Pop-Up Window](image)

When the above steps are completed the user is returned to the Change Request and the Risk field is populated with ‘Low’, ‘Medium’ or ‘High’ Risk based on the Risk Assessment. A new button is added to the top of the form called ‘Request Approval’.

![Figure 8 - Change Request Header with 'Request Approval' button](image)
4 Documenting Changes

Now that the type and risk of the change has been identified, additional mandatory information about the Change Request should be provided.

4.1 Change Category

The Change Category drop-down provides the following options: Application, Data Center, Database, Network, Server, Storage or Other.

If a Change Category of ‘Server’ is selected, a new (mandatory) field appears called ‘Configuration item’.

![Configuration item selection](image)

Use either the type-ahead or list lookup (magnifying glass icon) functions to select the appropriate server configuration item (CI) associated with the Change Request. When you save the record with an associated CI, a related list tab called ‘Affected CIs’ is populated at the bottom of the change form.

4.1.1 Selecting Multiple Configuration items

If you have to enter multiple configuration items for a Change Request, you must enter the first one as described above and save the record. To add additional CIs, go to the ‘Affected CIs’ tab and click the ‘Edit’ button.

![Affected CIs tab](image)

An Edit Members form appears (see figure 10). Select or search for the configuration items you need from the ‘Collection’ list on the left, and click ‘Add’ to include them in the ‘Affected CIs List’ on the right. When you have finished adding the configuration items you need, click Save and they will be added to the ‘Affected CIs’ related list on your Change Request.
4.2 **Impacted Services**

While affected configuration items can only be added to Server category changes, *all* changes allow the selection of impacted services.

Identify the services impacted (or potentially impacted) by the Change Request by completing the ‘Service’ field.

![Service](image)

**Figure 11 - The Service field**

You may use the type-ahead capability if you know the name of the impacted service, or you may use the magnifying glass to open list lookup pop-up window. The service you select will be listed in the ‘Impacted Services’ tab at the bottom of the Change Request form once it has been saved.

**4.2.1 Entering multiple impacted services**

To enter more than one impacted service, go to the Impacted Services tab and select ‘Edit’.

![Impacted Services](image)

**Figure 12 - Impacted Services tab**
The Edit Members form appears. Select the impacted services you need from the Collection list on the left and click ‘Add’ to include them in the Impacted Services List on the right. When you have identified all the impacted services, click ‘Save’. You will be returned to the Change Request form and they will be added to the Impacted Services related list tab.

4.3 The Planning tab

4.3.1 Implementation plan
The implementation plan should contain:

- Details of products, versions and configuration settings
- Information about staff or teams who will perform work
- Implementation task workflow

4.3.2 Backout plan tab
The backout plan should include:

- Steps that will be taken to restore normal service if the change fails
- Allowance time for rollback within the change window
- The identification of a specific backout trigger (time, responsible party) if the Change Request is impacting critical services

4.3.3 Test plan tab
The test plan should include:
• Pre-implementation testing results and details
• Post-implementation plans to confirm successful implementation and normal service operation

4.3.4 Communications plan tab
The communications plan should use existing methods of communication and follow the current guidelines at the time of the Change Request.

4.4 Relationships
Use the Relationships tab to identify other related (non-incident) records associated with a change, such as Releases or other Changes.

To relate the Change record with other records, click the ‘Edit’ button on the Relationship tab and you will be taken to an Edit Members form where you can search for related records and add them to the list.

Figure 13 - Relationships tab

4.5 Incidents Caused by Change
The Incidents Caused by Change tab allows you to either open a new Incident that was caused by the change, or link the change to an existing Incident. To open a new Incident related to the change record, click the ‘New’ button. To relate an existing Incident to the change, click on the ‘Edit’ button that will open an Edit Members form.

Figure 14 - Incidents Caused by Change tab

4.6 Using the Work notes and Activity log
The Work notes provide a journal for recording activity associated with Change record progress. Simply type the notes in the field and Save to add the notes to the Activity log.
4.7 Using Watch Lists

4.7.1 The Customer Watch List
You may add people to the Customer Watch list by clicking the lock icon and expanding the field as illustrated below. Examples of proper use of the Customer Watch list include ???

4.7.2 The IT Watch List
You may add people to the IT Watch list by clicking the lock icon and expanding the field as illustrated below (the IT Watch list can be found in the Notes tab). Examples of proper use of the IT Watch list include ???
5 Assigning Changes

Change Requests need to have the right implementation group and assignee identified. You may select the implementation group (Assignment group) for a Change Request by entering the information in the ‘Assignment group’ field.

Use either the type-ahead feature and begin typing the name of the assignment group, or click the magnifying glass to open a pop-up window that will show a list of assignment groups. Select the assignment group you need to populate the field.

If you know who the assigned to individual will be, you may apply the same procedure as above to the ‘Assigned to’ field. If you have already populated the ‘Assignment group’ field you will be given a list that is specific to the assignment group you entered.

Also, if you know the name of the assigned to individual you may enter the ‘Assigned to’ field first and the ‘Assignment group’ field will populate based on your selection.

NOTE: The ‘Assignment group’ field will be mandatory before you can request approval for a change. The ‘Assigned to’ field will be mandatory before you can complete the change.

Once a change is assigned to an individual, it will be displayed in the ‘My Assigned Changes’ list in that user’s Change Overview page.
6 Scheduling Changes

6.1 Checking for Conflicts

ServiceNow has a collision detector that provides the ability to detect whether planned changes conflict with other changes or have other scheduling issues. The ‘Check Conflicts’ links is available in the Related Links list below the Planning/Notes tabs as shown below.

Checking for conflicts will perform the following checks:

- Against blackout windows and business events
- Against changes already scheduled for the same service or configuration item

![Related Links list]

If there are no conflicts, ServiceNow will display a message at the top of the form:

![Change Request - There are NO CONFLICTS]

If there are collisions, ServiceNow will display a message at the top of the form.

![Change Request - Required field]

![Conflict message]

The Change Record will now have a Conflicts related list tab at the bottom of the form.

![Conflicts related list tab]
NOTE: Start and End dates AND a Configuration Item or a Service must be specified to check for conflicts.

6.2 Using the Change Schedule

To see the Change Schedule, click on Change Schedule in the Scheduling section of the Change application from the application navigator (see Figure).

![Change Schedule navigation](image1)

**Figure 18 - Change Schedule navigation**

The Change Schedule appears. You can adjust the view by clicking on the top, from 1 day to a year’s view of changes (see Figure).

![Change Schedule view](image2)

**Figure 19 - Change Schedule view**

Hovering over a change will display the Number and Summary of the change. Clicking on the change will open the change record in a new window. To go back to the Change Schedule, close the window.
6.2.1 Change / Release / Event Schedule

The same view can be used to display Changes in the context of Releases and Business Events. Click on the Change / Release / Event link in the application navigator and apply the same procedures as with the Change Schedule.

6.3 Using the Change Calendar

In the Scheduling dropdown of the Change application from the application navigator, click on the link Change Calendar. A Change Calendar report appears.

![Image of Change Calendar]

Figure 20 - The Change Calendar

The Change Calendar is a report, and so has all the querying and reporting capabilities of any report, including:

- The ability to highlight items based on specific criteria such as Risk, Change Type, or Approval
- Filtering and ordering (sorting) Changes
- Adding the calendar to your Home Page

More information about querying and reporting can be found in the section, ‘Querying and Reporting’.

6.3.1 Business Events

If you wish to see a list of business events, click on the Business Events link in the Schedule drop-down of the Change application from the application navigator.
A Change Business Events list appears (see Figure).

Figure 21 - Change Business Events

7 Submitting Changes

7.1 Requesting approval for a Change

When all mandatory fields are completed, you may request approval for your Change Request by clicking the ‘Request Approval’ button.

The Change Request form will provide you with a message at the top of the form, ‘Approval for CHG000000 requested’. The ‘Approvers’ tab related list at the bottom of the form displays a list of the approvers for the Change Request.
Each approver will receive an email notification as well as an approval request that will appear in their ‘My Pending Approvals’ list.

7.1.1 Adding ad-hoc approvers
Prior to a change being approved, additional ad-hoc approvers can be added as necessary. Click the Edit button to bring up the Edit Members window and select additional approvers from the Collection list to be added to the Approvers list.

7.2 Change Approval
The Change Management Process Description provides details on the approval levels for different change types. If you are an approver, the easiest way to approve a change is to go to your ‘My Pending Approvals’ list on your Change Overview page (look for ‘Change Overview’ in the Change module of the application navigator).

Look for the list gauge ‘My Pending Approvals’. Find the change you want to approve and right-click it; a drop-down list appears. Select ‘Approve’ or ‘Reject’.
The same procedure may be followed from the Approvers tab of a change record as illustrated below.

NOTE: If you are not the Approver the Approve/Reject options will not be functional.
8 Implementing Changes

As changes are performed, the Change Implementer/Assignee should update the Work Notes as appropriate, particularly if multiple groups and/or implementation tasks are involved.

Once the change effort is done, as soon as possible during the next available business hours the Change Implementer/Assignee should update the Work start and Work end fields in the Notes tab, along with the Change Outcome.

The Work Complete button can then be clicked to update the change record status. Depending on the Change Outcome and whether or not any CI’s or services were related to the change, additional tasks may be generated by ServiceNow.

NOTE: The Change Outcome, Work start, Work end and Work notes fields are mandatory before you can mark a change ‘Work Complete’.

8.1 Recording the Change Outcome

To record the Change Outcome, click to display the drop-down list and select one of the following:

- Implemented – Successful
- Implemented – Problems Encountered
- Change Failed

If you select either ‘Implemented – Problems Encountered’ or ‘Change Failed’, a task will be created called ‘Perform PIR for change’.

8.2 Update Configuration Item (CI) Tasks

For ‘Server’ category changes, if the Change Outcome is updated to ‘Implemented – Successful’, or ‘Implemented – Problems Encountered’, the task Update CIs for change is created. This task can be found in the Change Tasks related list.

Figure 25 - Change Tasks tab (Update CIs)
The task is assigned to the change assignee, who is responsible for the corresponding updates to the configuration item (server). You can see who is assigned this task by going to the Change Tasks tab (see Figure).

8.2.1 Updating Configuration Items

If the task **Update CIs for change** is required, open the Task by clicking the task number from the Change Overview window or the Tasks tab of the Change Request.

![Task number (Task related list form)](image)

Figure 26 - Task number (Task related list form)

The Change Task opens.

![Change Task](image)

Figure 27 - Change Task

Scroll down to the **Affected CIs** tab and click on the **Configuration Item** link to open the CI record.

![Affected CIs tab (Change Task form)](image)

Figure 28 - Affected CIs tab (Change Task form)
Edit the *Configuration Item* record based on the requirements outlined in the Change Request.

![Configuration Item record](image)

*Figure 29 - Configuration Item record*

Change the status of the *Change Task* to *Closed Complete* when you have completed updating the *Configuration Item* record, (if you have not completed the task change the status to *Pending*).

![Change Task status](image)

Click *Save* to remain in the record or *Update and Return* to go back to the prior window.
9 Change Review

9.1 Post Implementation Review Tasks
If this task is required per the Change Management policy, the Change record cannot be closed until the Post Implementation Review task is completed. You can see who is assigned the PIR task by going to the Change Tasks tab (see Figure).

Figure 30 - Change Tasks tab

9.2 Verify CIs for Changes (Servers)
When the Change Implementer completes an ‘Update CIs for Change’ task, a new task is created called ‘Verify CIs for Change’ that ensures that the proper updates to the CMDB are completed.

Figure 31 - Change Tasks tab (Verify CIs for change)

Once all tasks are complete, the status of the change request ticket will automatically update to “Closed”.
10 Querying & Reporting

10.1 Creating an ad hoc query

ServiceNow allows you to create and save ad hoc queries. For example, go to the Change module in the application navigator and click ‘Open’ to show the Change Request list form of all open changes. You can create a filter by opening the dropdown list and clicking on the ‘Filters’ option. A list of filters appears, and you can select a filter (such as ‘Closed’, etc.)

![Change Request related list (filtering)](image)

Figure 32 - Change Request related list (filtering)

By clicking the link ‘Edit personal filters’ in the dropdown list, the filters list form is opened.

![Filters](image)

Figure 33 – Filters

Click on ‘New’ to open the Filters form and create a new filter.

![Filter form (new filter)](image)

Figure 34 - Filter form (new filter)

Name the filter by completing the ‘Title’ field. Select the table you want to get filtering information from (i.e., Change table). Choose the filter criteria and save your query/filter criteria. It will now appear in your drop down list.
10.2 Creating a Report

To see a list of available reports, go to the application navigator and expand the Reports application. Click on ‘View / Run’.

A list of global reports (available to everyone) is presented, along with any reports saved for you (My saved reports) and for your Group (My groups reports).

![View / Run Reports](Figure 35 - View / Run Reports)

If you click on a report in the list the report is displayed as shown below. ServiceNow allows you to set a variety of variables, filters and/or search criteria to report on data. For example, you can change the type of report (pie chart, bar chart, etc.), which tables the report uses, filter or sort by different fields, perform calculations (count, sum, average) and change the size of the chart. You can also display the data in a grid format by checking the display grid option.

10.3 Creating a Custom Report

From the reports screen you can also create new reports and perform ad hoc queries on data in ServiceNow. Click the ‘New’ button next to Global reports and a blank report is shown. You may now add whatever ad hoc criteria you require to create your own report.
10.4 Scheduled Reports
If an administrator has scheduled reports for you, you can see a list of them by clicking the Scheduled Reports menu in the Reports application.

10.5 Exporting Form Data
From the Change Request form, click the drop down and select ‘Export’ and choose either PDF portrait or landscape.

![Exporting Form Data](image)

**Figure 36 - Exporting Form Data**

10.6 Exporting List Data
Export a list of records by right-clicking on a list header bar and selecting the export type. Export options include:

- Excel
- CSV
- XML
- PDF (Portrait)
- PDF (Landscape)
- PDF (Detailed Portrait): Exports the list and the associated form for each record.
- PDF (Detailed Landscape): Exports the list and the associated form for each record.
10.7 Sharing Reports

If you need to share a report with a user who does not have access to the Reports -> View / Run application, you can give them the direct URL to the report or add the report to a homepage to which the user has access.
11 Change Templates

11.1 Using Templates
ServiceNow allows you to create templates (pre-defined Change Models) to make it easier to create a Change Request.

To use a template, open a new Change Request and follow these steps:

1. Click on the drop-down next to the small green arrow
2. Choose ‘Templates’
3. Choose ‘Apply Template’
4. Select the template that you need to use

![Diagram of template selection process](image)

**Figure 38 - Using Templates**

11.2 Creating a New Template
Using the drop-down as explained above select ‘Edit Templates’ instead of ‘Apply Template’. A Templates list form appears.
Click an existing template if you want to edit, or click the ‘New’ button to create a new template. A blank Template form appears.

The template can be limited to you, your Group (by entering a Group name) or everyone (by clicking the ‘Global’ checkbox). The ‘Active’ checkbox determines whether the Template is in use at this time; unchecking the ‘Active’ checkbox will hide it from the template list.
The Template form allows you to identify which fields from the Change Request form may be pre-filled by your template. Give the template a Name (change the default name). Do not change the Table field; it is completed for you. Select the field from the ‘choose field’ drop down and enter the pre-filled information you desire in the corresponding field. If you make a mistake you can delete a field by clicking the ‘x’ next to the field entry.